BPM Change Management Meeting

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May 26, 2020

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# Agenda – BPM Change Management Meeting
## May 26, 2020

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<td>Priyanka Namburi</td>
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<td>Outage Management BPM</td>
<td>Kalyani Abhyankar</td>
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<td>Generator Management BPM</td>
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<td>Generator Interconnection Procedures BPM</td>
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<td>Generator Interconnection and Deliverability Allocation Procedures BPM</td>
<td>Debi Le Vine</td>
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<td>Demand Response BPM</td>
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<td>Market Instruments BPM</td>
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<td>Settlements and Billing BPM</td>
<td>Brenda Corona</td>
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<td>Reliability Requirements BPM</td>
<td>Kyle Woody, Melanie Schimschal</td>
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<td>Transmission Planning Process BPM</td>
<td>Jeff Billinton</td>
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<td>Congestion Revenue Rights BPM</td>
<td>Jim McClain</td>
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<td>Wrap-Up and Next Steps</td>
<td>Nicole Hines</td>
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BPM Change Management Process
916-608-5862 BPM_CM@caiso.com
### California ISO Stakeholder Initiative Process

**PROPOSAL DEVELOPMENT**
- Issue paper
  - Straw proposal
  - Draft proposal
  - Draft business requirement specification
  - Draft tariff

- Stakeholder input

**DECISION**
- Final proposal
- Board
  - EIM Governing Body
- Tariff filing
- FERC

**IMPLEMENTATION**
- Business practice manual revisions
  - Market simulation
- Go Live

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- **Business Practice Manuals**
  - The purpose of BPMs is to set forth business practices that implement the ISO tariff.

  - The ISO conducts a yearly policy initiative roadmap process to consider and rank initiatives.
    - *Policy changes submitted though the PRR process will be referred to the policy initiative road map process.*

  - Each subject area in a BPM is based on enabling language in the ISO tariff.
    - *The PRR process cannot be used to introduce changes that are not supported by existing tariff authority.*
## Metering BPM

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<th>PRR</th>
<th>PRR Title</th>
<th>Stage</th>
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</thead>
<tbody>
<tr>
<td>1253</td>
<td>Energy storage and distributed energy resources 3B Updates</td>
<td>Initial</td>
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</table>
PRR 1253 – Energy storage and distributed energy resources 3B Updates

• Reason for revision
  – Energy storage and distributed energy resources (ESDER) 3B initiative updates added PDR Load Shift Resource information

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
## Outage Management BPM

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<th>PRR</th>
<th>PRR Title</th>
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<tbody>
<tr>
<td>1252</td>
<td>Language to clarify 24 hour outage rule</td>
<td>Initial</td>
</tr>
<tr>
<td>1248</td>
<td>Updates for energy storage and distributed energy resources 3B to sections 3.4 and 4.1</td>
<td>Initial</td>
</tr>
<tr>
<td>1236</td>
<td>Removal of section 4.5 as an implementation of 1122 appeals decision</td>
<td>Recommendation</td>
</tr>
</tbody>
</table>
PRR 1252 – Language to clarify 24 hour outage rule

• Reason for revision
  – This is resubmission of the originally withdrawn PRR 1137.

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
PRR 1248 – Updates for energy storage and distributed energy resources 3B to sections 3.4 and 4.1

• Reason for revision
  – Updates for energy storage and distributed energy resources (ESDER) 3B initiative.

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
PRR 1236 – Removal of section 4.5 as an implementation of 1122 appeals decision

• Reason for revision
  – This emergency implementation is due to PRR 1122 Appeal Committee Decision.

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – May 19, 2020

• Next step:
  – Post final decision
## Generator Management BPM

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<th>PRR</th>
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<tbody>
<tr>
<td>1251</td>
<td>Implementation of FERC Order 845 changes to the Generator Interconnection Procedures</td>
<td>Initial</td>
</tr>
</tbody>
</table>
PRR 1251 – Implementation of FERC Order 845 changes to the Generator Interconnection Procedures

• Reason for revision
  – Implement changes required by FERC Order 845 including requirements for control equipment, expanding modifications allowed after the studies, adding the ability to transfer surplus interconnection service and introducing permissible technological advancements. In addition the CAISO is clarifying the facilities reassessment process.

• Initial comments:
  – SDG&E; submitted 5/19/2020

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
### Generator Interconnection Procedures BPM

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<tr>
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<tbody>
<tr>
<td>1250</td>
<td>Implementation of FERC Order 845 for Generator Interconnection Procedure and Agreements</td>
<td>Initial</td>
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</tbody>
</table>
PRR 1250 – Implementation of FERC Order 845 for Generator Interconnection Procedure and Agreements

• Reason for revision
  – Implement the changes order by FERC to revise the Generator Interconnection Procedure and associated Generator Interconnection Agreements. The changes include the requirement for control equipment on generators, allowing transfer of surplus interconnection service and adding permissible technological advances for a fee instead of a modification assessment deposit.

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
Generator Interconnection and Deliverability Allocation Procedures BPM

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<tr>
<td>1249</td>
<td>Implementation of FERC Order 845</td>
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PRR 1249 – Implementation of FERC Order 845

• Reason for revision
  – Implementation of FERC Order 845 which amended the Generator Interconnection Process and Agreements. Specifically for GIDAP clarifying text; and adding additional functionality including expanding the scope of studies; expanding the changes allowed after the Phase I results; transfer of surplus interconnection service and permissible technological advancements.

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
### Demand Response BPM

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<tr>
<td>1247</td>
<td>Updates for energy storage and distributed energy resources 3B initiative</td>
<td>Initial</td>
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</table>
PRR 1247 – Updates for energy storage and distributed energy resources 3B initiative

- Reason for revision
  - Updates for ESDER 3B initiative, and minor clarification on existing process in Sections: 2.6, and 3.
- Initial comments:
  - No comments submitted
- Initial comment period expired:
  - May 19, 2020
- Next step:
  - Post recommendation
## Market Operations BPM

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<tr>
<th>PRR</th>
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<tbody>
<tr>
<td>1246</td>
<td>Changes to market operations related to energy storage and distributed energy resource initiative</td>
<td>Initial</td>
</tr>
<tr>
<td>1235</td>
<td>Manual dispatch codes</td>
<td>Recommendation</td>
</tr>
</tbody>
</table>
PRR 1246 – Changes to market operations related to energy storage and distributed energy resource initiative

- Reason for revision
  - This update is related to part 3B of energy storage and distributed energy resource (ESDER) multi-phased initiative that allows the renewable resources to participate more efficiently in the market. In particular, the ISO developed a load shift product to allow behind the meter storage devices to assist in load curtailment, as well as load consumption, under the proxy demand response (PDR) participation model.
    - Effective date: 10/1/2020

- Initial comments:
  - No comments submitted

- Initial comment period expired:
  - May 19, 2020

- Next step:
  - Post recommendation
PRR 1235 – Manual dispatch codes

• Reason for revision
  – This is an update to the listing of expected energy types to include some manual dispatch codes. This is already in effect.

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – May 19, 2020

• Next step:
  – Post final decision
## Market Instruments BPM

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<tr>
<th>PRR</th>
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<tbody>
<tr>
<td>1245</td>
<td>Changes to market instruments related to energy storage and distributed energy resource initiative</td>
<td>Initial</td>
</tr>
<tr>
<td>1242</td>
<td>Changes to hydro default energy bid formulation</td>
<td>Initial</td>
</tr>
</tbody>
</table>
PRR 1245 – Changes to market instruments related to energy storage and distributed energy resource initiative

• Reason for revision
  – This update is related to part 3B of energy storage and distributed energy resource (ESDER) multi-phased initiative that allows the renewable resources to participate more efficiently in the market. In particular, the ISO developed a load shift product to allow behind the meter storage devices to assist in load curtailment, as well as load consumption, under the proxy demand response (PDR) participation model.
    – Effective date: 10/1/2020

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
PRR 1242 – Changes to hydro default energy bid formulation

• Reason for revision
  – CAISO is changing the formulation of the weighting factor that applies to the long-term component of the Hydro Default Energy Bid to a dynamic weighting factor that considers index prices in highest to lowest ranking order. The ISO also clarifies fallback logic when power prices are missing and the liquidity criteria for considering additional pricing hubs.
  – Effective Date: 05/01/2020

• Initial comments:
  – SCE; submitted 5/19/2020

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
## Settlements and Billing BPM

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<tbody>
<tr>
<td>1244</td>
<td>Updated BPM configuration guide for CC 6045 over and under scheduling EIM settlement to align the documentation with current active settlement configuration</td>
<td>Initial</td>
</tr>
</tbody>
</table>
PRR 1244 – Updated BPM configuration guide for CC 6045 over and under scheduling EIM settlement to align the documentation with current active settlement configuration

• Reason for revision
  – This change is in result of a pass through bill variable that was not included in the configuration guide but was present in Settlements configuration (Effective date was 3/1/2017).
  – CC 6045 Over and Under Scheduling EIM Settlement to include this variable in the documentation to maintain consistency with Settlements configuration.
  – The variable is already active in the system, and these are documentation only changes, which do not result in a configuration change

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
# Reliability Requirements BPM

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<td>1243</td>
<td>Energy storage and distributed energy resources 3 proxy demand resource</td>
<td>Initial</td>
</tr>
<tr>
<td>1239</td>
<td>Stabilization of maximum import capability baseline calculation</td>
<td>Recommendation</td>
</tr>
<tr>
<td>1237</td>
<td>Removal of reference to outage management BPM section 4.5 for 1122 appeals decision</td>
<td>Recommendation</td>
</tr>
</tbody>
</table>
PRR 1243 – Energy storage and distributed energy resources 3 proxy demand resource

• Reason for revision
  – The reason for the revision was to introduce a new a type of proxy demand resource (PDR) – Load shift resource load curtailment stemming from ESDR3B.

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
PRR 1239 – Stabilization of maximum import capability baseline calculation

• Reason for revision
  – Changes are required in order to provide an enhanced level of MIC stabilization from one year to the next and the proposal is the final result of the Maximum Import Capability Stabilization and Multi-Year Allocation stakeholder initiative as available in the Revised Straw Proposal posted March 12, 2020.

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – May 19, 2020

• Next step:
  – Post final decision
PRR 1237 – Removal of reference to outage management BPM section 4.5 for 1122 appeals decision

• Reason for revision
  – This emergency implementation is due to PRR 1122 Appeal Committee Decision.

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – May 19, 2020

• Next step:
  – Post final decision
Transmission Planning Process BPM

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<tr>
<td>1241</td>
<td>Revision to update electromagnetic transients modeling requirements in Section 10</td>
<td>Initial</td>
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</table>


PRR 1241 – Revision to update electromagnetic transients modeling requirements in Section 10

• Reason for revision
  – Revision to update the EMT modeling requirements for generator models

• Initial comments:
  – No comments submitted

• Initial comment period expired:
  – May 19, 2020

• Next step:
  – Post recommendation
## Congestion Revenue Rights BPM

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<tr>
<td>1240</td>
<td>Congestion revenue rights clarifications</td>
<td>Recommendation</td>
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</tbody>
</table>
PRR 1240 – Congestion revenue rights clarifications

• Reason for revision
  – The purpose of this PRR submission is to add additional clarification to sections 7.2.2, 7.3.1, 7.3.2.2.5 and Attachment J

• Recommendation comments:
  – No comments submitted

• Recommendation comment period expired:
  – May 19, 2020

• Next step:
  – Post final decision
Next BPM PRR Review Monthly Meeting:
June 23, 2020 @ 11 a.m.

BPM change management
process questions:
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